

Assign a contact to a company🔗

Assign a Contact to a Company From a *Contact* Record

- 1. Open the contact record.
- 2. Click on **Search** to choose an existing company.

Last Name

Company

Company

Choose a company

Go

[Search...](#)

Clear

Job Title

Person Type

Please select a person type

Lead Source

qg106.infusiontest.com

- 3. Click the **Select** link next to the company that the contact should be assigned to. (Using the search capabilities may make it easier to find the company. Type all or part of the company name and click Search.)

| | | | |
|--|------|--------------------------|-----------------------------------|
| | 7709 | [Select] | Elit Pedes LLC |
| | 7813 | [Select] | Montes Nascetur Ridiculus Limited |
| | 7817 | [Select] | Fermentum Metus Aenean Limited |
| | 7821 | [Select] | Mauris Corporation |
| | 7825 | [Select] | Dolor Corporation |
| | 7829 | [Select] | Et Nunc Quisque LLC |
| | 7685 | [Select] | Vehicula Corporation |

- 4. Click on the **Save** button to apply the update.

Save Save & Search Delete Clone

Tasks Scored & Recent Activity Follow-up Sequences Call

Assign a Contact to a Company From a *Company* Record

1. Do a contact search from CRM > Contacts by entering the search criteria (company name, email address, etc.) for the contacts that should be assigned to a company.

Search Criteria

First Name starts with ▼

Last Name starts with ▼

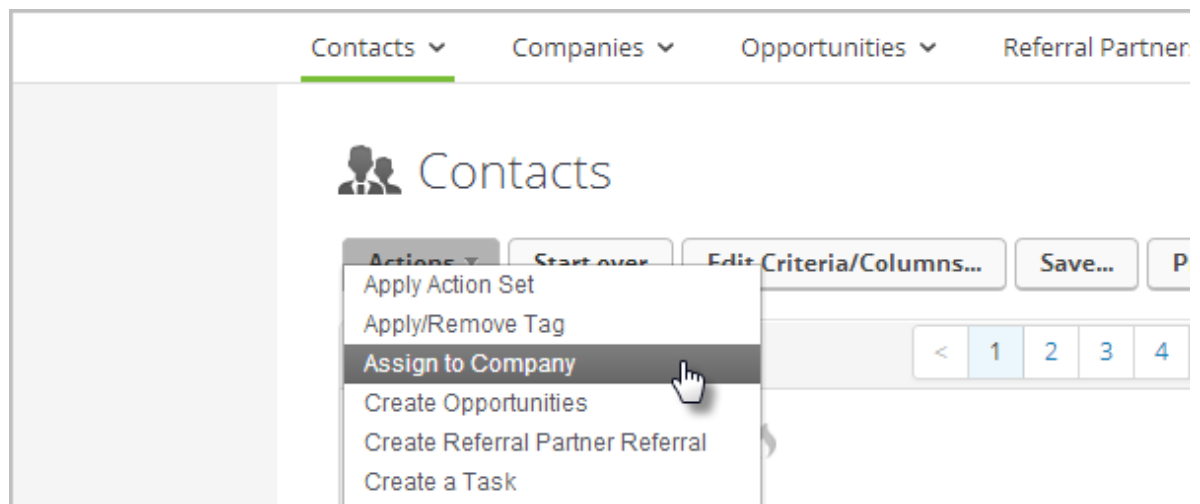
Company starts with ▼

Email ends with ▼ @infusionsoft

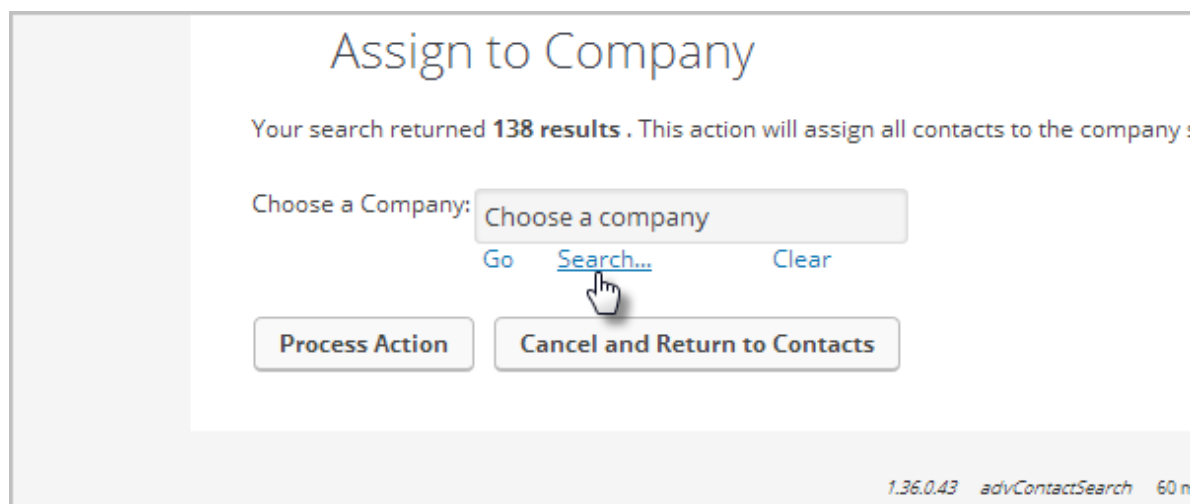
Temp do not filter ▼

Tag Ids With ANY of these T. ▼

2. Review the list and mark the checkboxes for the contacts that should be assigned to the company.
3. Click on the **Actions** button and select **Assign to Company**.



4. Click on **Search** to choose an existing company.



5. Click on the **Process Action** button.

